

April 2007

RE: EDEExpress for Windows 2006-2007, Release 5.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2006-2007, Release 5.0. Release 5.0 is the final EDEExpress 2006-2007 enhancement release implementing provisions of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171.

In addition to other changes, the HERA implements two new Title IV grant programs—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent Grant (National SMART Grant). The HERA also extends Federal Direct PLUS Loan (Direct PLUS) eligibility to graduate or professional students.

Note: The HERA provides for eligible graduate or professional students to receive Direct PLUS Loans on or after July 1, 2006. The HERA provision does not create a new loan program; instead, the HERA enables a new type of borrower—an eligible graduate or professional student—to borrow under the existing Direct PLUS Loan Program. In EDEExpress 2006-2007, Release 3.0 and forward, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

EDEExpress 2006-2007, Release 5.0, enables the export of ACG and National SMART Grant data requests to the Common Origination and Disbursement (COD) System and the import of ACG and National SMART Grant-specific versions of files such as the Year-to-Date (YTD) and Multiple Reporting Record (MRR). Release 5.0 also updates Direct Loan functionality to enable the creation of subsidized and unsubsidized loan origination records that follow the increased annual loan limits established by the HERA on loans first disbursed on or after July 1, 2007.

Release 5.0 also resolves a software issue affecting a limited number of schools that prevents the import of External Disbursement Add/Change (PGED07OP) files for ACG and National SMART Grant records.

This letter includes the following information:

- An overview of EDEExpress 2006-2007, Release 5.0 enhancements related to the HERA
- A description of the ACG/National SMART Grant external import issue resolved in EDEExpress 2006-2007, Release 5.0
- Reminders on backing up and optimizing your EDEExpress database

How to Get EDEExpress and Documentation

You can download Release 5.0 and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Instructions for downloading EDEExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *Installation Guide for EDEExpress for Windows 2006-2007* at fsadownload.ed.gov/softexpress0607.htm.

If you have trouble accessing the FSAdownload Web site, contact CPS/SAIG Technical Support at **800/330-5947 (TDD/TTY 800/511-5806)** or by e-mail at CPSSAIG@ed.gov.

Note: Some organizations restrict their users from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

If You Have Technical Support Questions

If you have questions regarding EDEExpress, such as installation issues, software problem resolution, or software functionality, or you require other technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947 (TDD/TTY 800/511-5806)**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov. A representative will respond within one business day.

You can also post questions regarding EDEExpress on our e-mail listserv, FSATECH. FSATECH is an electronic mailing list for technical questions about Federal Student Aid systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, go to fsa4schools.ed.gov, click "Listserve/Mailing Lists" on the left menu, and click the "FSATech" link.

Note: Make sure you include your telephone number in your message in case we need additional information. We will research your question and post our response to the mailing list so that everyone can benefit from the information.

If You Have Questions Regarding the COD System

If you have questions regarding the COD System, contact the COD School Relations Center at **800/4PGRANT (800/474-7268)** for ACG, National SMART Grant, and Pell Grant or **800/848-0978** for Direct Loan. You can also e-mail CODSupport@acs-inc.com.

If You Have Questions Regarding the HERA

If you have policy-related questions regarding the HERA, contact Federal Student Aid's Research and Customer Care Center (RCCC) at **800/433-7327** or by fax at **202/275-5532**. You can also e-mail the RCCC at fsa.customer.support@ed.gov. Hours are 9 a.m. to 5 p.m. ET, Monday through Friday, excluding federal holidays.

Table of Contents

EDExpress for Windows 2006-2007, Release 5.0 Overview	1
Release 5.0 Enhancements Related to the HERA.....	1
ACG/National SMART Grant External Import Issue Resolved in Release 5.0	6
2006-2007 COD Technical Reference.....	6
Reminders	7
Back Up Your Database Regularly	7
Optimize Your Database with Software Utilities	7
Run the Compact and Repair Database Utility	7
Run the Verify Database Utility.....	8

EDEExpress for Windows 2006-2007, Release 5.0 Overview

EDEExpress for Windows 2006-2007, Release 5.0 can be installed as an upgrade to Release 1.0, Release 2.0, Release 3.0, or Release 4.0. You must have Release 1.0, Release 2.0, Release 3.0, or Release 4.0 installed to run an upgrade (or “custom”) installation of Release 5.0.

Reminder: Before upgrading to Release 5.0, ensure you have a valid, reliable backup copy of your current EDEExpress 2006-2007 database (expres67.mdb).

To upgrade to Release 5.0, select either the Stand Alone Custom or Workstation Custom option during installation, depending on your EDEExpress operating environment.

If you have not installed EDEExpress 2006-2007 on your system, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 5.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation loads a completely new, blank EDEExpress 2006-2007 database to your system. If a database already exists for 2006-2007 on your system, a full installation of Release 5.0 overwrites the database and all data previously entered is lost.

For more information on the EDEExpress installation process, see the *Installation Guide for EDEExpress for Windows 2006-2007*, which is available for download from the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

Release 5.0 Enhancements Related to the HERA

The Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171, implements two new Title IV grant programs—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent Grant (National SMART Grant). The HERA also extends Federal Direct PLUS Loan (Direct PLUS) eligibility to graduate or professional students. In EDEExpress 2006-2007, Release 3.0 and forward, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

In September 2006 and December 2006, Federal Student Aid posted EDEExpress 2006-2007, Release numbers 3.0 and 4.0, respectively. These first two of three planned software releases added enhancements related to the HERA, including the ability to create and process origination and disbursement records for ACG and National SMART Grant awards. For more information on Release 3.0 and Release 4.0 enhancements related to the ACG, National SMART Grant, Grad PLUS, and other changes based on the HERA, see the cover letter specific to each release on the FSAdownload Web site at fsadownload.ed.gov/arc_softexpress0607.htm.

EDEExpress 2006-2007, Release 5.0 adds the following functionality related to the HERA:

- **Pell Export and Import Updated to Add ACG and National SMART Grant Data Request Functionality** – We updated Pell functionality to enable the export of ACG and National SMART Grant data requests to the COD System and the import of ACG and National SMART Grant-specific versions of files such as the Year-to-Date (YTD) and Multiple Reporting Record (MRR).

The process for exporting an ACG or National SMART Grant data request is similar to the existing EDEExpress process for exporting a Pell data request. Go to **File, Export, Pell**, select either **ACG Data Request** or **National SMART Data Request**, select the appropriate checkboxes for the data you want to request, ensure the Reporting Pell ID for your request is accurate, then click **OK** to perform the export.

All ACG and National SMART Grant data request import options are combined with existing Pell import options in Release 5.0. To import files sent by the COD System in response to an ACG or National SMART Grant data request, go to **File, Import, Pell** and select the appropriate Import Type for the file you have received. For example, to import an ACG Year-to-Date file (message class AGYR07OP), select **YTD (PGYR, AGYR, SGYR)** as the Import Type.

Note: As with Pell, some ACG and National SMART Grant data files are generated and submitted to you automatically by the COD System. For example, MRRs are system-generated as a result of a processing conflict with another school for a given student.

The following 2006-2007 ACG and National SMART Grant export and import message classes, modeled on the existing Pell versions in terms of content and format, are added in Release 5.0:

New Message Classes for EDEExpress 2006-2007

Message Class	Data Description	User Sends or Receives
AGRQ07IN	ACG Data Request	Sends
SGRQ07IN	National SMART Grant Data Request	Sends
AGRA07OP	ACG Data Request Response	Receives
SGRA07OP	National SMART Grant Data Request Response	Receives
AGYR07OP	ACG Year-to-Date Data	Receives
SGYR07OP	National SMART Grant Year-to-Date Data	Receives
AGMR07OP	ACG Multiple Reporting Record	Receives

New Message Classes for EDEExpress 2006-2007

Message Class	Data Description	User Sends or Receives
SGMR07OP	National SMART Grant Multiple Reporting Record	Receives
AGRC07OP	ACG Reconciliation File	Receives
SGRC07OP	National SMART Grant Reconciliation File	Receives
AGTX07OP	ACG Text File	Receives
SGTX07OP	National SMART Grant Text File	Receives
AGPD07OP	ACG Pending Disbursement Report	Receives
SGPD07OP	National SMART Grant Pending Disbursement Report	Receives
PGSN07OP	Pell Grant, ACG, and National SMART Grant SSN/Name/Date of Birth Change Report*	Receives

* The PGSN07OP message class is not new for Release 5.0; however, the COD System now includes ACG and National SMART Grant data in this file in addition to Pell Grant data.

You can update the default import or export directory path for these new message classes by accessing File Management (**Tools, Setup, Global, File Management**) in Release 5.0.

- **Direct Loan Module Enables Sub/Unsub Records Following Increased Annual Loan Limits** – We updated Direct Loan functionality to enable the creation of subsidized and unsubsidized loan records that follow the increased annual loan limits established by the HERA.

The increased loan limits resulting from the HERA are shown in **bold** below and can be applied to loans first disbursed on or after July 1, 2007:

- **\$3,500** for 1st year undergraduate base subsidized/unsubsidized loans; \$4,000 for additional unsubsidized loans
- **\$4,500** for 2nd year undergraduate base subsidized/unsubsidized loans; \$4,000 for additional unsubsidized loans
- \$5,500 for 3rd year and beyond undergraduate base subsidized/unsubsidized loans; \$5,000 for additional unsubsidized loans

- \$8,500 for graduate/professional base subsidized/unsubsidized loans; **\$12,000** for additional unsubsidized loans
- \$2,625 for preparatory coursework base subsidized/unsubsidized loans (for enrollment in an undergraduate program); \$4,000 for additional unsubsidized loans
- \$5,500 for preparatory coursework base subsidized/unsubsidized loans (for enrollment in a graduate or professional program); **\$7,000** for additional unsubsidized loans
- \$5,500 for teacher certification base subsidized/unsubsidized loans; **\$7,000** additional unsubsidized loans
- \$27,167 additional unsubsidized loans for Health professions undergraduate level students; **\$47,167** additional unsubsidized loans at the graduate level.

Note: The aggregate loan limits for subsidized and unsubsidized loans have not been increased. Also, the preparatory undergraduate coursework loan limits remain at \$2,625 for base subsidized/unsubsidized loans and \$4,000 in additional unsubsidized loans.

Note: The higher loan limits apply to loans first disbursed on or after July 1, 2007. The COD System uses the date of the earliest anticipated disbursement (DRI = False) if there are no actual disbursements (DRI = True) when determining the appropriate loan limits to apply. The COD System uses the earliest actual disbursement, if both actual and anticipated disbursements exist for a loan, when determining the appropriate loan limits to apply.

You should also note the following details regarding Release 5.0 and the new annual loan limits established by the HERA:

- The Direct Loan origination edits are modified to accommodate the new loan limits established by the HERA.
- You can manually create origination records that follow the new loan limits in Release 5.0, as well as add or modify loan disbursements following the new loan limits using a Direct Loan External Import Add or Change file.
- The EDEExpress Package/Repackage process is not modified to award subsidized loans (Aid Type **S**) or unsubsidized loans (Aid Type **U** or **D** for non-need based or need-based unsubsidized loans, respectively) at the new annual loan limits in 2006-2007 versions of the software (including Release 5.0). EDEExpress 2007-2008, Release 1.0 (now available on the FSAdownload Web site) is the first version to update the Package/Repackage process for the new limits. However, users of EDEExpress 2006-2007 Packaging can increase subsidized and unsubsidized awards manually to the new limits in Packaging records at any time.
- The Direct Loan Packaging Data import (**File, Import, Direct Loan**) is updated to enable you to import EDEExpress Packaging loan data manually adjusted to the new loan limits to create loan origination records in the Direct Loan module.

For more information on the HERA's annual loan limit changes for the Direct Stafford Loan Program, see [Dear Colleague Letter GEN-06-02](#), posted on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov, on March 10, 2006.

- **Direct Loan Fee Percentages Can Be Modified in EDEExpress** – The HERA made changes to the Higher Education Act of 1965 to reduce the loan fee charged to Stafford borrowers in the Direct Loan Program. This fee drops to 2.5 percent on July 1, 2007; 2.0 percent on July 1, 2008; 1.5 percent on July 1, 2009; and 1.0 percent on July 1, 2010. For any 2006-2007 Stafford Subsidized or Unsubsidized loans that have a first disbursement date on or after July 1, 2007, the Sub/Unsub Loan Fee Percentage in COD School setup (**Tools, Setup, COD, School, Direct Loan**) must be changed to 2.5 percent.
 - You can also correct loan records at the individual record level that have been rejected because the origination fee percentage is incorrect. When the origination status is **E** (Origination error received from COD), the Fee Percentage field on the Origination tab is enabled. If there are any rejected actual disbursements (status **E**), delete them from the disbursement grid. Change the fee percentage to the correct amount, reduce the Loan Amount Approved to zero and click **Save**. Click **Yes** at the prompt to reset the Loan Status to Ready to Send. Then re-enter the correct Loan Amount Approved and click Save again. Click **Yes** at the prompt to recalculate the anticipated disbursements. The origination fee is recalculated at the correct percentage, and the origination is ready to be exported.
 - If you have loan records with an origination status of **A** (Accepted) that have an incorrect fee percentage and **no accepted actual disbursements**, you can change the fee percentage to the correct percentage depending on the date of the first disbursement. Open the record and click the Origination tab (Direct Loan). Change the Loan Amount Approved to zero and click **Save**. This enables the Fee Percentage field. Change the fee percentage to the correct amount, re-enter the Loan Amount Approved, and click **Save**. When the prompt to Recalculate Anticipated Disbursements appears, click **Yes**. This creates an origination change record that will be exported in your next COD Common Record (CRAA07OP) export file.
 - If you have loan records with an origination status of **A** (Accepted) that have an incorrect fee percentage and **an accepted first actual disbursement**, you cannot change the fee percentage on that loan record to the correct percentage. You must reduce the accepted actual disbursement to zero and send the adjustment to the COD System. After that adjustment is accepted, reduce the Loan Amount Approved to zero, mark it Inactive, export, and transmit the change to the COD System. After that change is accepted, create and originate an entirely new loan with the correct fee percentage.

Note: If you are still originating loans for 2006-2007 with a first disbursement date before July 1, 2007 you must change the Sub/Unsub Loan Fee Percentage field back to 3.000 in COD School setup before originating those loans.

For more information on enhancements to Application Processing, Packaging, Pell, Direct Loan, and Global functionality related to the HERA, see the September 2006 addenda to the *EDEExpress for Windows 2006-2007, Release 1.0 Desk Reference* and the *EDEExpress for Windows 2006-2007, Release 2.0 Desk Reference*. Both documents are available on the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

ACG/National SMART Grant External Import Issue Resolved in Release 5.0

Release 5.0 resolves a software issue in EDEExpress 2006-2007, Release 4.0 and prior versions that rejected ACG and National SMART Grant External Disbursement Add/Change (PGED07OP) records if the Award ID contained an Attended Pell ID Code ending in "00."

2006-2007 COD Technical Reference

Volume III (Direct Loan and Pell Combination System Supplement) of the *2006-2007 COD Technical Reference* has been updated to add information and guidance related to the HERA, including importing ACG, National SMART Grant, and Grad PLUS origination and disbursement data from an external system into the EDEExpress software (in addition to Pell and other Direct Loan data).

You can download the latest version of Volume III of the *2006-2007 COD Technical Reference* from the FSAdownload Web site, located at fsadownload.ed.gov.

Reminders

Back Up Your Database Regularly

You should back up your EDEExpress database file (expres67.mdb) regularly so you do not lose your data. We recommend that you back up your files after each major update to your database (for example, after updating a large group of origination or disbursement records), or at least once a week. You should also back up your data before and after you run the software utilities as a precautionary measure.

EDEExpress does not include a backup utility. You must use your own backup system. Be sure to test your backup system regularly to verify that you can reliably restore your database.

Optimize Your Database with Software Utilities

EDEExpress contains utilities that enable you to optimize your database to prevent problems. We recommend that you run the Compact and Repair Database and Verify Database utilities at least once a week. Be sure to create a backup of your database before and after running these utilities.

Run the software utilities in the following order:

- Compact and Repair Database
- Verify Database
- Compact and Repair Database

Run the Compact and Repair Database Utility

The Compact and Repair Database utility resolves inconsistencies in record storage and improves the performance of the EDEExpress database. Running this utility at least once per week helps to prevent database problems.

Events such as a power outage or a Local Area Network (LAN) failure can corrupt your database if it occurs while users are logged into EDEExpress. If your system functions unpredictably (for example, you start getting database error messages), run the Compact and Repair Database utility.

Running the Compact and Repair Database utility on a regular basis can make your database significantly smaller and improve EDEExpress' performance. The utility reduces the size of your database by organizing and storing records more efficiently and by removing any records that have been flagged for deletion.

Warning: Before using the Compact and Repair Database utility, be sure you have space on your hard drive or LAN folder that is at least equal to three times the current size of the database. You should also ensure all other users are logged out of EDEExpress before running the Compact and Repair Database utility.

Run the Verify Database Utility

Each student record in EDEExpress has multiple parts that are stored in different database tables. The Verify Database utility checks the integrity of relationships between these tables. If EDEExpress shuts down due to a program error or halts abnormally while you are processing data, links between various parts of a record can become damaged. Verify Database repairs these damaged links within the database.

You should always run the Compact and Repair Database utility before and after running the Verify Database utility. Running this utility at least once per week is recommended as part of your preventative maintenance routine.

Warning: Before using the Verify Database utility, ensure you have hard drive or LAN folder space available that is equal to at least three times the current size of your EDEExpress database. You should also ensure all other users are logged out of EDEExpress before running the Verify Database utility.